



North Carolina Department of Health and Human Services

Division of Aging and Adult Services

Aging Resource Management System (ARMS)

Report User

Version 4

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1 Introduction and Overview

Welcome to the Aging Resource Management System (ARMS). The ARMS system is accessible by all area agencies on aging, service providers, and any government entity with the need to access data.

The Aging Resource Management System (ARMS) is a client tracking system for demographic data and a reimbursement system that ties reimbursement to performance.

1.1 What is ARMS?

ARMS provides users with the convenience of on-line web access. The system includes functionality and features to facilitate data entry, reporting, and tracking of client information and service impacts over time. At any given time during the year, data is available to report service unit, program costs and income, and non-unit costs such as area planning and administration, etc.

1.2 ARMS Objectives

ARMS is designed with the following goals:

- To establish a statewide database for reporting client demographic data including eligibility.
- To establish a statewide database for budgetary control, delivery of units of service and non-unit activities incorporating Older Americans Act regulations on matching, program income, and other requirements as needed.
- To provide a linkage of databases to track services and costs to the client level.
- To meet federal reporting requirements.

1.3 Who uses ARMS?

The ARMS system is written for the use of the Division of Aging and Adult Services (DAAS) and its constituents. Those who will use ARMS include:

- Regional Area Agencies on Aging
- Aging Service Providers (non-profit, profit, public, minority)
- County Lead Agencies and other DHHS Personnel

User types require a different level of access to the features and functionality of ARMS. User access is managed by DAAS, which will assign each individual ARMS user a different role which is appropriate to the access level he or she requires.

The five user access types are:

1. Provider
2. Region
3. Admin
4. County
5. **Report**

User Type	Functions Available
County	ARMS users with “ County ” access may only View or Print County Reimbursement Reports
Report	Those assigned “ Report ” access may only View or Print Reports

Table 1 – User Functionality

2 Basic ARMS Functionality

This section describes the access, support, and basic functionality features which apply to all ARMS users.

2.1 Accessing the ARMS System

Only authorized users can access the ARMS System using any Internet connection. An ARMS user ID and password are assigned—along with the appropriate user role—by DAAS. Contact [Linda Owens](#) or [Annette Bagwell](#) at 919-733-8390 to request access.

2.2 ARMS System Availability & Connectivity

Most questions about ARMS—including news and documentation—will be located on the ARMS support website. (<http://www.ncdhhs.gov/aging/arms/armspage.htm>). Users are strongly encouraged to use this resource before calling your Regional ARMS Coordinator or DAAS.

Although ARMS is designed to be available 24 hours a day including weekends, there may be occasional times the server may be unavailable to users.

Connectivity help and/or issues for users are available from DHHS Customer Support Center Monday through Friday from 7:00 a.m. to 5:30 p.m. except State observed holidays.

To reach the DHHS Customer Support Center, call 919-855-3200 and press option 2. You will be asked a series of questions, including but not limited to:

1. The system you are using (ARMS)
2. Your Name or Your User ID
3. Location
4. Depending on what role you have in the system:
 - Report Role must provide their DHHS Division (Controller’s Office, DAAS)
 - County Role must provide their County (Craven)

For **Application/Support** call the ARMS Coordinators, Linda Owens or Annette Bagwell, at 919-733-8390. To speed the troubleshooting process, be prepared with exact details about the behavior, issues, or error messages received. You can also e-mail linda.owens@ncmail.net or annette.bagwell@ncmail.net.

2.3 ARMS User Data Entry Requirements

Data must be in ARMS by 5:00 p.m. on or before the 11th of the each month to be reimbursed for the current report period. When the 11th falls on a holiday the due date is the next working day. If the 11th falls on a weekend, data is due the following Monday.

The processing of reimbursement reports and other financial documents will occur on the 12th calendar day of the month. When the 12th falls on a holiday the due date is the next working day. If the 12th falls on a weekend, data is due the following Monday. These reports along with previous months will be available at all times.

2.4 Starting ARMS

Follow these steps to begin using the ARMS system:

1. Launch an Internet browser using Internet Explorer 6.0 or higher or Netscape Navigator 7.0 or higher. **Preferred.**
2. Click the “**Access ARMS**” link from the ARMS support website (<http://www.ncdhhs.gov/aging/arms/armspage.htm>):

Access ARMS System
Authorized Users Only

Most users will get a Security Alert screen similar to this:

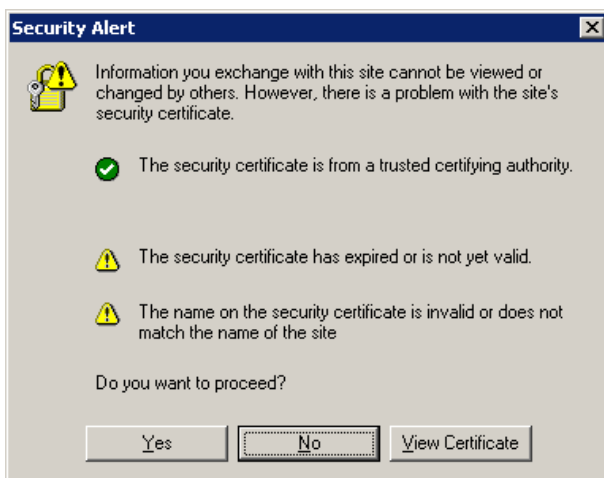


Figure 1 – Security Alert

Click **Yes** to continue.

Hint: For easy access directly to the ARMS webpage, add the <http://www.ncdhhs.gov/aging/arms/armspage.htm> link to “**Favorites**” in Internet Explorer or “Bookmark this Page” in Netscape.

NOTE: You must have pop-ups enabled in order for the menu structure to operate correctly. To enable pop-ups in Internet Explorer, Click on the **Tools menu | Pop-up Blocker | Pop-up Blocker Settings**. Enter the ARMS website address in the text box under “Address of Web site to allow:” and click **Add**. This will be required for each PC used to access ARMS.

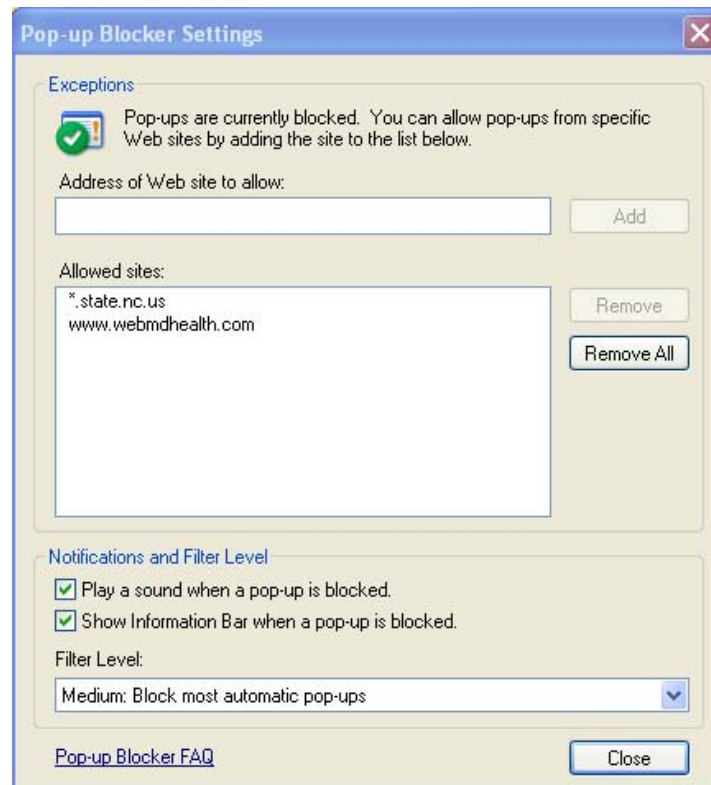


Figure 2 – Pop-Up Blocker Settings

3. The Web Identity Role-based Management (WIRM) login page will display.

The image shows the WIRM portal login screen. At the top, there is a header with the DHHS logo on the left, the text "WIRM portal" in large blue letters, and "web identity role management" in smaller black letters below it. To the right of the header are two buttons: "Login" and "Disclaimer". In the center, there is a login form with two input fields: "Name : linda.owens" and "Password : *****". Below these fields is a "Login" button. Below the login form is a box titled "Support Contact Information" containing text about security issues and contact information for the DHHS Customer Support Center. At the bottom of this box, it says "posted by Ramana.Reddy on 8/7/2006 at 4:44 PM".

Figure 3 – WIRM Portal Login Screen

4. Enter the assigned WIRM user Name and Password. (This name is typically the user first and last name (Example – linda.owens). There will be some exceptions with common names (John Smith, Mary Smith) as these require using middle initials or some other combination. The password must be at least 8 alphanumeric characters. The password is case-sensitive and will expire every 90 days.
5. Click Login.

A user profile has been set up for **all** authorized users. Functionality in ARMS is based on the user's unique profile. The profile includes identifying information about each user and the information a user can access. Users will see only that functionality which is assigned to one of the five access roles.

You may change your password and other information at any time by using the **My Settings** link after you login.



Figure 4 – My Settings

If the **name is not found** a message appears, check the assigned username and try again. If the **password is incorrect** a message appears, check the password and type it in again. WIRM users have three consecutive tries to login with their Name and Password, after which they will be *locked out* of the WIRM Portal. This helps prevent “hackers” from gaining system access.

If locked out, users **must** call the DHHS Customer Support Center (Help Desk), 919-855-3200, option 2, to have their password reset. The Division of Aging and Adult Services staff **cannot** reset passwords.

Some users have multiple applications in WIRM, all of which are visible by clicking the **My Applications** tab which appears beneath the WIRM logo.



Figure 5 — The WIRM Portal “My Applications” Screen

6. Click the **thumbprint screen shot** or the **title text** to open ARMS to your home page, which is based on user role.

The WIRM Portal automatically logs users OFF the system after a period of inactivity. If the following screen appears simply login again to continue using ARMS.



Figure 6 – Session Expired Screen

2.5 Getting Help in ARMS

Click on **Help** to open a copy of the latest ARMS *User Manual*.

2.6 Logging Out of ARMS

When finished using ARMS, always log out by clicking **Logout** under the DHHS Logo.



Figure 7 WIRM Logout

Logging out helps prevent unauthorized access to ARMS. The WIRM system will automatically log users out after a given period of inactivity. (See Figure 5)

3 Reports

Report users only have access to Reports. Users should click on the report type hyperlink to view list of available reports.

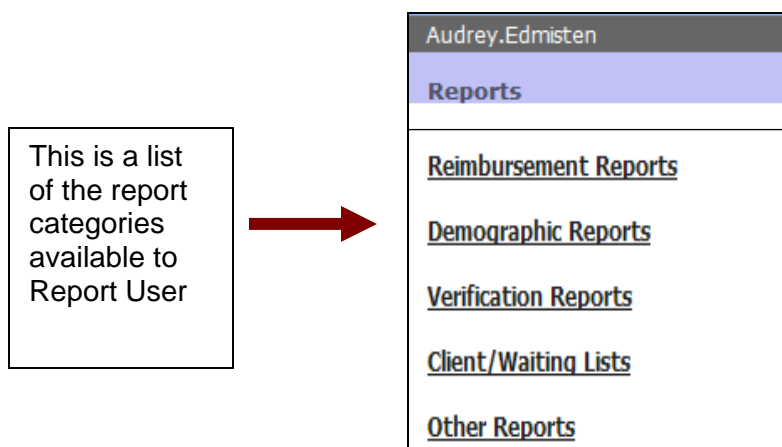


Figure 8 – ARMS Report User

3.1 Types of Reports

Click on any of the named categories to view all the reports in that heading. For example, click on **Reimbursement Reports** to view:

Reimbursement Reports

Name	Description
ZGA370	Provider Reimbursement
ZGA370-A	Provider Summary
ZGA370-A-YTD	Year-to-Date Provider Summary
ZGA370-YTD	Year-to-Date Provider Reimbursement
ZGA370-CNTY	Provider Reimbursement Sorted by County
ZGA370-CNTY-YTD	Year-to-Date Provider Reimbursement Sorted by County
ZGA370-A-CNTY	Provider Summary Sorted by County
ZGA370-A-CNTY-YTD	Year-to-Date Provider Summary Sorted by County
ZGA370-5	Legal Summary Report
ZGA370-6	Senior Center Outreach Summary Report
ZGA370-7	Provider Reimbursement Report - IIID/Health Promotion 90%
ZGA370-10	Provider Reimbursement Report - IIID/Health Promotion 85%
ZGA370-11	State Senior Center General Purpose Funding Report
ZGA370-12	Family Caregiver Support Summary Report
ZGA380-A	Regional Summary Report by Category
ZGA380-B	Regional Summary All Categories
ZGA390	Area Agency Summary
ZGA390-Respite	Area Agency Summary - In Home/Family Caregiver/Respite
ZGA390-A	State Summary

Figure 9 –Reimbursement Reports

The name of each report (left column) is a hyperlink which opens the report-builder screen.

NOTE: Each report differs slightly in the parameters a Provider user may select. What follows is a typical example, after which parameter selection will be self evident.

For example, clicking on the first named report ([ZGA370](#) | [Provider Reimbursement](#)) opens the parameter selection.

Reimbursement Reports

Name	Description
ZGA370	Provider Reimbursement
ZGA370-A	Provider Summary
ZGA370-A-YTD	Year-to-Date Provider Summary

Click on the report **name** to view the following parameter selection screen

Each user will have unique report parameters from which to choose. In this example, this user can select report month and county.

Report - ZGA370
Provider Reimbursement

Report Month:

Region:

County:

Provider:

NON Selectable Fields

Figure 10 – Report Parameters

Report - ZGA370
Provider Reimbursement

Report Month:

Region:

County:

Provider:

This report requires that the user select the **Report Month** and **County** using the drop-down selection method

Click **Generate Report** to create the report

NOTE: Reports may take a few seconds to generate.

Report - ZGA370
Provider Reimbursement

Report Month:

Region:

County:

Provider:

Alamance
Caswell
Davidson
Guilford
Montgomery
Randolph
Rockingham

Figure 11 - Typical Report Parameter Selection

Clicking any of the Report Category Links will display a list of available reports

Financial Reports	
Name	Description
ZGA060	Financial Report (AAA)
ZGA517	Service Reimbursement Report
ZGA545	Invoice for MIS Services

Client/Waiting Lists	
Name	Description
ZGA600	Clients Waiting for Service Grouped by Service
ZGA625	Clients Waiting for Service Grouped by Provider

Other Reports	
Name	Description
ZGA903	Units of Service Report (Turnaround Document)
YTD Export	Year to Date Data NOTE: This report is for Exporting to Excel Only

Figure 12 – Report Category Links

3.1.1 Reimbursement Report Headings

Below is a sample ZGA-370 Report

The RUN DATE is the actual date DAAS processed the monthly reimbursement

Report month

Date report was generated by the user

The way Reimbursement Reports are compiled and/or calculated have not changed

SERV CODE	GROSS BUDGETED SERVICE COST	PROGRAM GROSS HCCBG ALLOTMENT	CURRENT UNITS	GROSS UNIT RATE	CURRENT MONTH EXP	CURRENT MONTH CS/PI	OTHER ADJ	ADD CURRENT MONTH EXPEND	CURRENT MONTH LOCAL SHARE	NET CURRENT MONTH EXPEND	NSIP CURRENT MONTH REIMS
030	88,237	66,178	0	32.8997	0	0	0	0	0	0	0
CATEGORY IN HOME AND SUPPORT SERVICES TOTAL											
	88,237	66,178	0		0	0	0	0	0	0	0
PROVIDER G002 FRIENDSHIP ADULT DAY SERVICES TOTAL											
	88,237	66,178	0		0	0	0	0	0	0	0

Figure 13 – Sample Report

3.2 Other Types of Reports

Demographic Reports

Name	Description
ZGA204-1	Cumulative Unduplicated Persons Served by Region and Provider
ZGA204-2	Cumulative Unduplicated Persons Served by Region and County
ZGA204-3	Cumulative Unduplicated Persons Served by Region
ZGA541-1	Client Demographic Information by State
ZGA541-2	Client Demographic Information by Region
ZGA541-3	Client Demographic Information by County
ZGA541-4	Client Demographic Information by Provider

Click on the link of Report Name

Most report functions are the same for all report

Users can choose what they want to print...region, county or specific provider

Fiscal Year:

Region:

County:

Provider:

Figure 14 – Report Criteria

Financial Reports

Name	Description
ZGA060	Financial Report (AAA)
ZGA517	Service Reimbursement Report
ZGA545	Invoice for MIS Services

Reports are available by User Role. For example, a Report User has access only to the **Financial Reports**, but also has full access to **Other Reports**.

Other Reports

Name	Description
ZGA701	Aging Service Providers
ZGA702-A	Provider Directory by Service
ZGA702-B	Provider Directory by County
YTD Export	Export Year to Date Reimbursement Data
ProviderExport	Export Provider Information

3.3 Report Functionality

A Report Navigation panel appears in the upper left screen of all generated reports. The following table describes the functionality associated with each icon in this bar.








ICON	FUNCTION	DESCRIPTION
	Export	Save the report to a different file format (TXT, CSV, etc) for use by an external application. ¹
	Print	Prints the report to a user-selectable printer
	Tree View	Expands/Collapses reports into logical section (NOTE: Not available for all reports)
	First Page	Navigates to the first page of the report
	Previous Page	Navigates to the previous page of the report
	Next Page	Navigates to the next page of the report
	Last Page	Navigates to the last page of the report.

Table 2 – Report Navigation Panel Options

¹ TXT = Text File, for import into word processor; CSV = Comma-Separated Values, for importing into spreadsheet or database files; PDF = opens with Adobe Acrobat Reader, if installed on the local computer

3.4 Viewing Reports

The Tree View allows the user to Expand the view, by Region, County, and/or Provider

Item in list are Links, click to access Region, County or Provider Code

Report Header:

NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES
PROVIDER REIMBURSEMENT REPORT - ZGA370
REGION G COUNTY 001 Alamance
PROVIDER G002 FRIENDSHIP ADULT DAY SERVICES
CATEGORY IN HOME AND SUPPORT SERVICES

Metadata:

RUN DATE: 04/27/2007
MONTH REPORTING: March 2007
PRINT DATE: 06/08/2007

SERV CODE	GROSS BUDGETED SERVICE COST	PROGRAM GROSS HCCBG ALLOTMENT	CURRENT UNITS	GROSS UNIT RATE	GROSS CURRENT MONTH EXP	CURRENT MONTH CS/PI	OTHER ADJ	ADJ CURRENT MONTH EXPEND
030	88,237	66,178	0	32.8997	0	0	0	0
CATEGORY IN HOME AND SUPPORT SERVICES TOTAL								
	88,237	66,178	0		0	0	0	0
PROVIDER G002 FRIENDSHIP ADULT DAY SERVICES TOTAL								
	88,237	66,178	0		0	0	0	0

Figure 15 – Report View

In the tree view it allows the user to expand the view on-line. When you go to print the actual report it will print the whole report. In this example: The first level is region (G), second level is county code (001), third level is provider code (G002) and if it is a reimbursement report is **may** have a fourth level to view the report by service category.

3.5 Printing the Report



To print the report,
Click the Printer Icon
The screen to the
right will display
If this screen does not
display, you need to
enable or allow
PopUps.

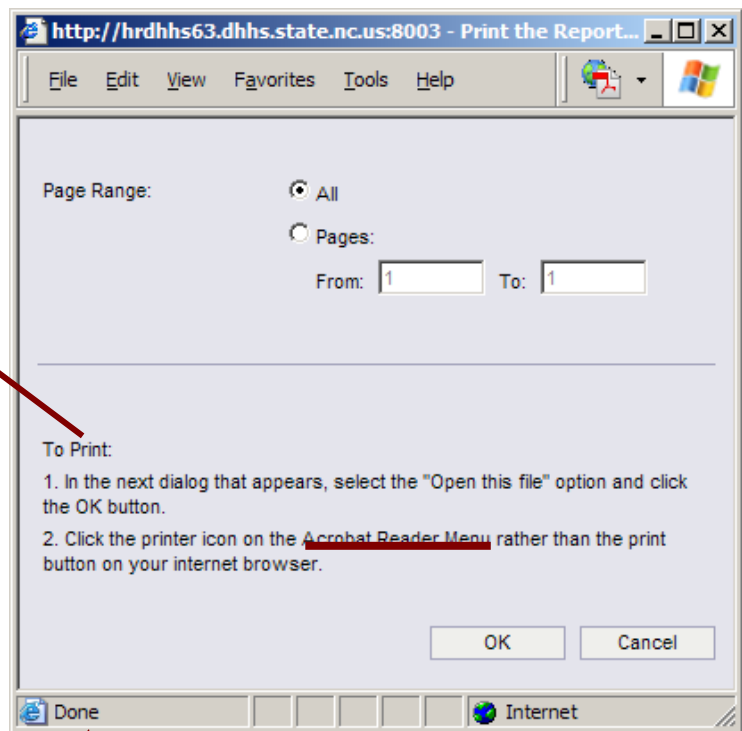


Figure 16 - Printer

The report will generate a PDF file. When the report has finished generating the word **Done** will appear in bottom of the dialog box.

The user can continue to print this report by clicking on the Printer Icon or they can also save this PDF file to a file area on their computer.

Click the Printer Icon to print the report or Select File, Print

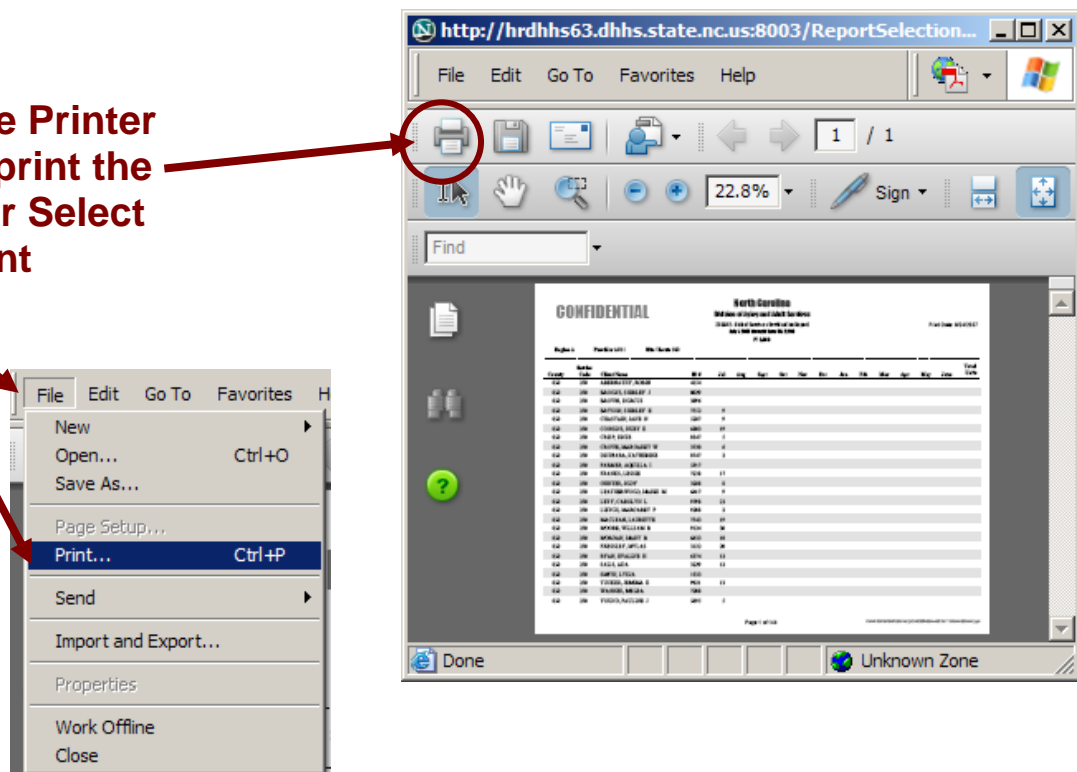


Figure 17 – Send Report to Printer

A printer dialog screen will appear.

Printer dialog screens will vary depending on your default printer

Select your criteria

Click **Ok** to Print

Click **Cancel** to abort

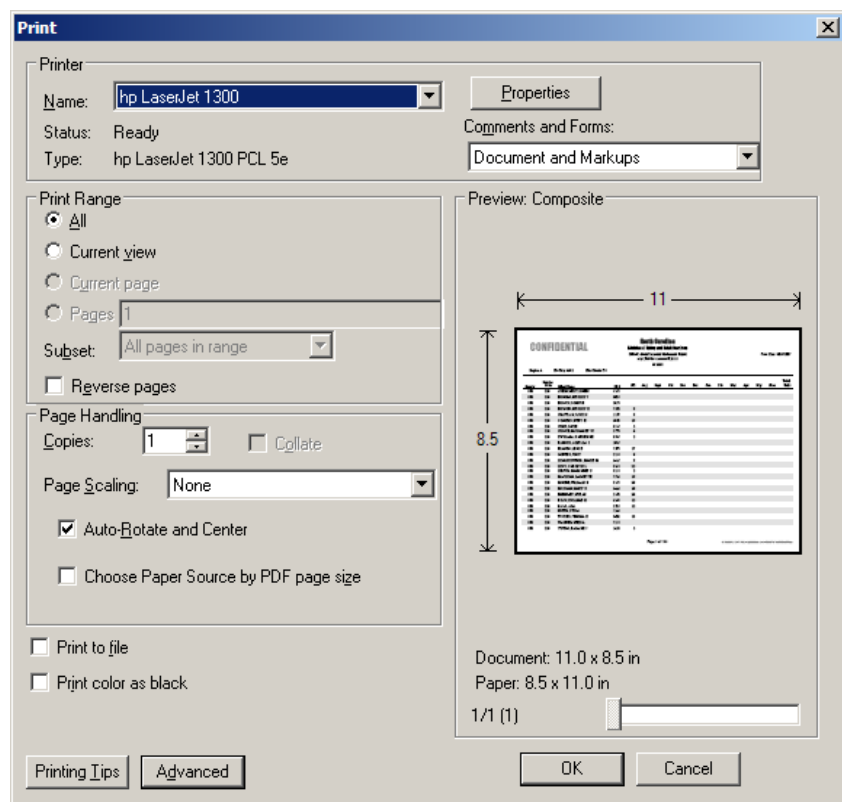
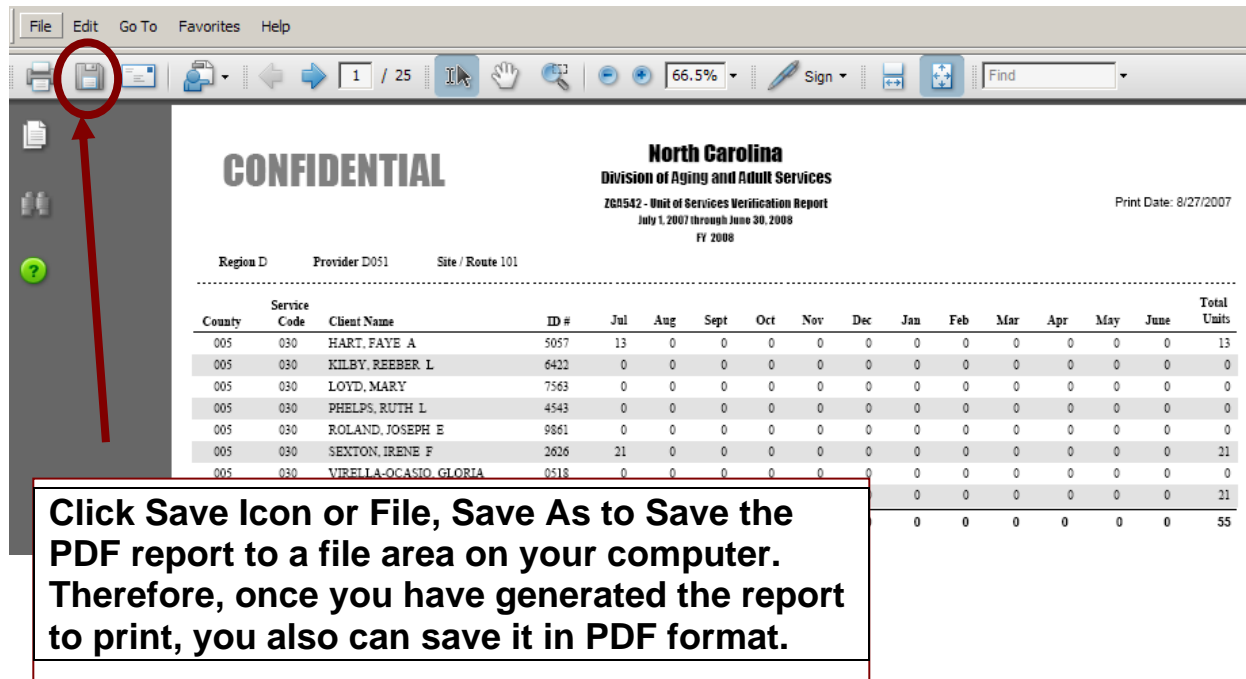


Figure 18- Print Dialog Box

3.6 Save Report to a file



CONFIDENTIAL

North Carolina
Division of Aging and Adult Services
Z6R542 - Unit of Services Verification Report
July 1, 2007 through June 30, 2008
FY 2008

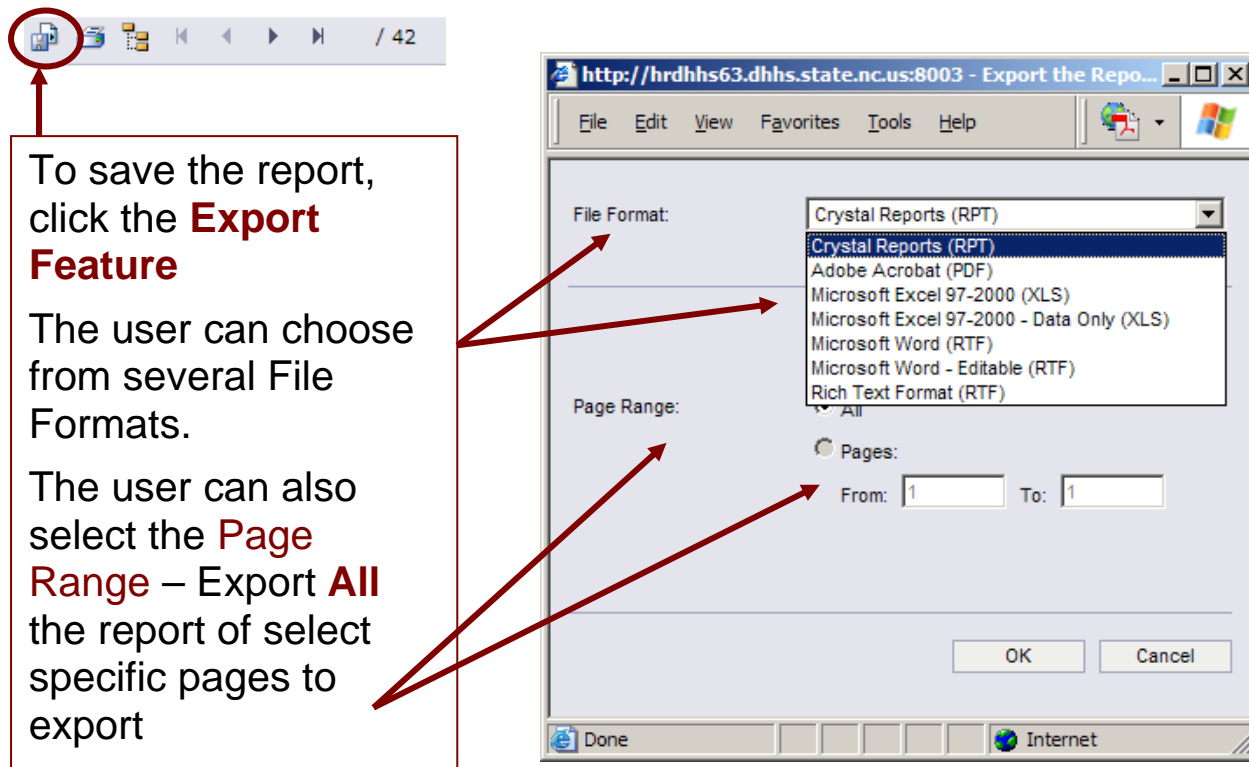
Print Date: 8/27/2007

Region D	Provider D051	Site / Route 101	County	Service Code	Client Name	ID #	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total Units
005	030	HART, FAYE A	005	030	HART, FAYE A	5057	13	0	0	0	0	0	0	0	0	0	0	0	13
005	030	KILBY, REEBER L	005	030	KILBY, REEBER L	6422	0	0	0	0	0	0	0	0	0	0	0	0	0
005	030	LOYD, MARY	005	030	LOYD, MARY	7563	0	0	0	0	0	0	0	0	0	0	0	0	0
005	030	PHELPS, RUTH L	005	030	PHELPS, RUTH L	4543	0	0	0	0	0	0	0	0	0	0	0	0	0
005	030	ROLAND, JOSEPH E	005	030	ROLAND, JOSEPH E	9861	0	0	0	0	0	0	0	0	0	0	0	0	0
005	030	SEXTON, IRENE F	005	030	SEXTON, IRENE F	2626	21	0	0	0	0	0	0	0	0	0	0	0	21
005	030	VIRELLA-OCASIO, GLORIA	005	030	VIRELLA-OCASIO, GLORIA	0518	0	0	0	0	0	0	0	0	0	0	0	0	0
																			55

Click Save Icon or File, Save As to Save the PDF report to a file area on your computer. Therefore, once you have generated the report to print, you also can save it in PDF format.

Figure 19 - Save PDF Report

3.6.1 Report File Format to Save



To save the report, click the **Export Feature**

The user can choose from several File Formats.

The user can also select the **Page Range** – Export **All** the report or select specific pages to export

File Format: Crystal Reports (RPT)
Crystal Reports (RPT)
Adobe Acrobat (PDF)
Microsoft Excel 97-2000 (XLS)
Microsoft Excel 97-2000 - Data Only (XLS)
Microsoft Word (RTF)
Microsoft Word - Editable (RTF)
Rich Text Format (RTF)
All

Page Range:
Pages:
From: 1 To: 1

OK Cancel

Figure 20 – Report file format to save

3.6.2 Save Report to a File

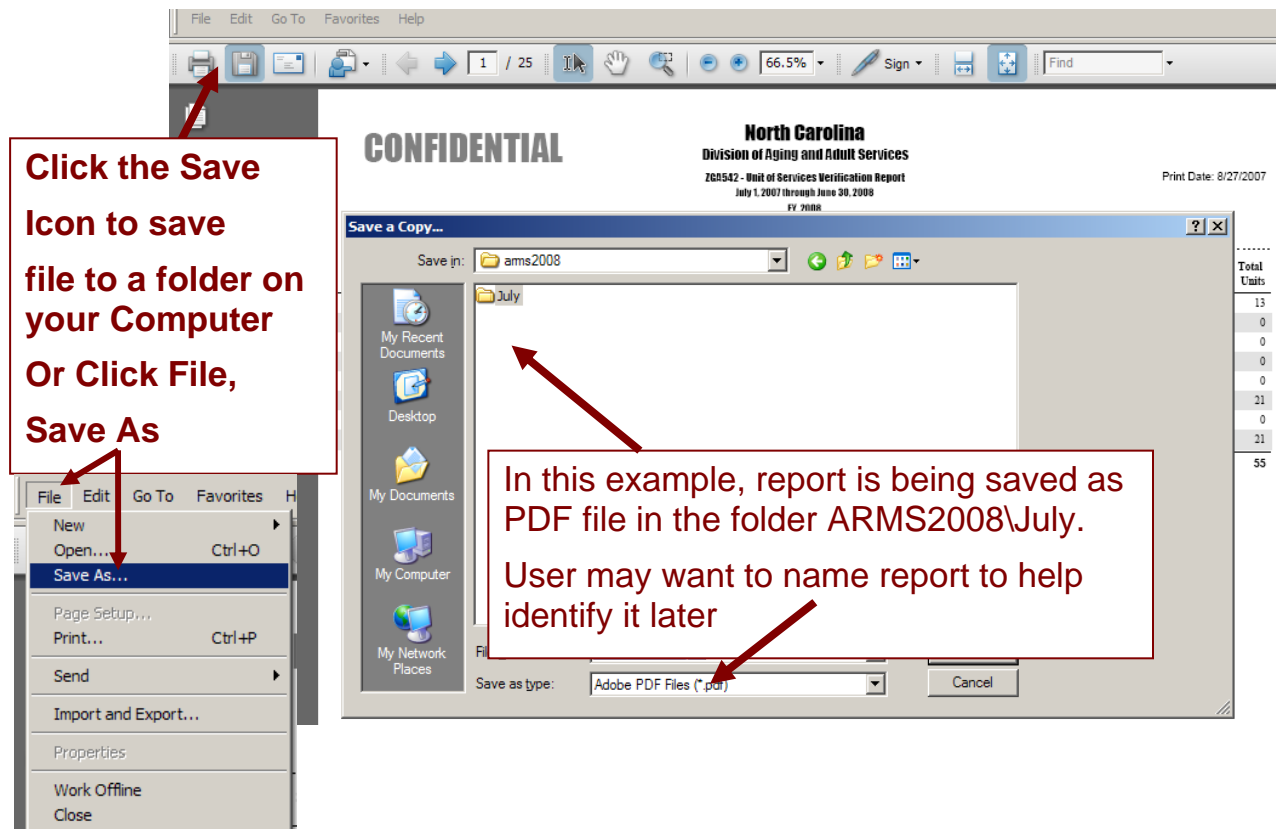


Figure 21 - Save Report to a File